"Average '83 new-car purchase price was $9,179."

ple replies, 70 percent said they had cut options; 54 percent would keep cars longer; 33 percent would buy a smaller model; and 11 percent said they would drive even less.

Options used car buyers would eliminate to reduce costs include vinyl roofs (83 percent), power windows (80 percent), appearance trim (52 percent), air conditioning (35 percent), and automatic transmission (28 percent).

About 28 percent of used car buyers reported they traded another auto to buy their current model (down from 34 percent in '79), compared with almost three-quarters of new car buyers who traded an old unit for their new one.

At Least 20 Percent of "Real Women Do Pump Gas"

A new poll question found 79 percent of used car buyers bought fuel at self-service rather than full-service stations, including 70 percent of the women. With 28 percent of women now buying used cars, the poll shows (in contradiction to the recent book title, *Real Women Don't Pump Gas*) that almost 20 percent of them actually do serve themselves at fuel islands.

The company projects some 17.391 million second-hand units were retailed last year, reversing a two-year down sales-trend. The figure was up from 16.643 million in '82, but fell short of the record 18.664 million retailed in '80.

The '83 used car sales compare with 8.924 million new cars retailed. Total U.S. used car outlays aggregated $85.3 billion, up 7.4 percent from $79.4 billion in '82. The figures boosted combined new and used car sales last year 7.9 percent, to 26.32 million vehicles costing $167.2 billion, against 24.39 million units selling for $148.2 billion in '82. This totaled a 12.8 percent spending advance.

Used Car Running Costs Stay Steady — Save 38 Percent

Typical ownership and operating costs for used autos bought last year remained virtually level — at 23.61 cents a mile, up fractionally from 23.56 cents in '82 for a typical 5-year-old compact driven four years at 10,000 miles annually. Costs of younger units dropped slightly.

"Again last year, used car buyers continued averaged savings of almost 60 percent under '83 new car sticker prices, and about 38 percent under new car ownership and operating expenses in comparable driving," the study reported.

Average '83 new car purchase price was estimated at $9,179 against $8,886 in '82. New car ownership and operating expenses for a typical compact-sized model driven 10,000 miles annually for five years was 43.28 cents a mile, against 44.67 in '82. AF

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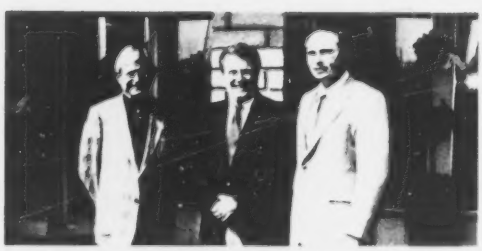

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Used Cars

The following are average car prices for the period ending August 1, 1984. Prices are based on wholesale activity at major dealer auctions across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically on IBM machines. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of Automotive Market Report.

Model	Zone 1	Zone 2	Zone3
82 AMC CONCORD			
Sdn 6-4 Dr	3823	3863	3787
Sta Wgn 30	4023	4065	3983
81 AMC CONCORD			
Sdn 6-4 Dr	3074	3106	3044
Sta Wgn	3237	3269	3203
82 BUICK SKYLARK			
Sdn	4511	4556	4466
81 BUICK SKYLARK			
Sdn	3693	3734	3660
82 BUICK REGAL			
Turbo Cpe	6403	6467	6340
Cpe	6205	6267	6143
81 BUICK REGAL			
Turbo Cpe	5697	5754	5640
Cpe	5499	5553	5443
82 BUICK LESABRE			
Sdn	6812	6880	6742
81 BUICK LESABRE			
Sdn	5281	5333	5228
82 CADILLAC			
Cpe DeVille	10350	10454	10247
Sdn DeVille	10286	10389	10185
81 CADILLAC			
Cpe DeVille	7813	7892	7733
Sdn DeVille	7759	7838	7682
82 CHEVY			
Chvt Htchbk 2-Dr	3070	3101	3039
Chvt Htchbk 4-Dr	3140	3174	3112
Camaro Cpe 8	6744	6814	6680
81 CHEVY			
Chvt Htchbk 2-Dr	2409	2431	2386
Chvt Htchbk 4-Dr	2461	2485	2436
Camaro Cpe 8	5270	5322	5218
82 CHEVY CITATION			
Cpe 6	3567	3603	3532
81 CHEVY CITATION			
Cpe 6	2969	3000	2938
82 CHEVY MALIBU			
Clas Sdn	5257	5311	5206
Clas Sta Wgn	5486	5545	5433
Clas Est Wgn	5632	5687	5575
81 CHEVY MALIBU			
Cpe	4124	4163	4082
Sdn	4052	4091	4010
Clas Cpe	4409	4453	4366
82 CHEVY MONTE CARLO			
Cpe	5908	5969	5849
81 CHEVY MONTE CARLO			
Cpe	5258	5312	5207
82 CHEVY IMPALA			
Sdn	5740	5798	5682
Imp Wgn 9	5966	6025	5907
81 CHEVY IMPALA			
Sdn	4613	4658	4565
Cpe	4635	4677	4586
Wgn 9	4804	4851	4754
82 CHRYSLER			
LeBaron Sdn	5562	5618	5507
81 CHRYSLER			
Npt Sdn	4880	4927	4831
82 DODGE OMNI			
4 Dr Custom Htchbk	3551	3585	3515
81 DODGE OMNI			
4 Dr Custom Htchbk	2775	2802	2748
82 DODGE ARIES			
Cpe	4264	4307	4219
81 DODGE ARIES			
Sdn	3596	3634	3559
82 DODGE DIPLOMAT			
Sln Sdn	4739	4785	4692
81 DODGE DIPLOMAT			
Sln Cpe	4030	4070	3989
Sln Sdn	4030	4070	3989
82 FORD FAIRMONT			
Futura Sdn 4 Dr	3910	3948	3871
81 FORD FAIRMONT			
Sdn 4 Dr	3082	3112	3052
82 FORD MUSTANG			
Cpe 4	4265	4310	4225
81 FORD MUSTANG			
Cpe 4	3589	3627	3553
82 FORD GRANADA			
Sdn 8-L	4590	4637	4543
81 FORD GRANADA			
Sdn 8-L	3743	3781	3708
82 FORD LTD			
Sdn	6110	6168	6047
81 FORD LTD			
Sdn	4905	4953	4855
81 FORD ESCORT			
Sdn 4 Dr	2690	2719	2666
82 FORD CROWN VIC			
Sdn	6877	6947	6807
81 FORD CROWN VIC			
Sdn	5559	5610	5501
82 FORD THUNDERBIRD			
Cpe	5990	6049	5928
81 FORD THUNDERBIRD			
Cpe	5208	5254	5153
82 LINCOLN CONTINENTAL			
Sdn	12036	12154	11916
Mark VI Cpe	12297	12420	12174
81 LINCOLN CONTINENTAL			
Sdn Designer	11442	11557	11328
Mark VI Cpe	10302	10405	10198
82 MERCURY COUGAR			
GS Cpe	4628	4674	4583
Sdn	4628	4674	4583
81 MERCURY COUGAR			
Cpe	3777	3817	3740
Sdn	3777	3817	3740
81 MERCURY ZEPHYR			
Sdn 2 Dr	3109	3142	3079
82 MERCURY LYNX			
HthBk 3-Dr	3296	3332	3266
82 MERCURY MARQUIS			
Sdn	6447	6510	6384
81 MERCURY MARQUIS			
Cpe Brougham	5860	5923	5803
Sdn	5181	5234	5131
Wgn-2	5294	5348	5241
82 OLDS CIERA			
Cpe	5691	5749	5634
Sdn	5769	5828	5713
82 OLDS CUTLASS SUPREME			
Cpe	6272	6336	6211
Sdn	6032	6093	5973
81 OLDS CUTLASS			
Sdn	5129	5180	5078
Sup Cpe	5499	5553	5443
82 OLDS 88			
Sdn Royale	6895	6961	6825
Cpe Royale	6916	6983	6847
81 PLYMOUTH HORIZON			
4 Dr Htchbk	2727	2756	2703
82 PLYMOUTH RELIANT			
Cpe	4249	4294	4210
81 PLYMOUTH RELIANT			
Cpe	3584	3618	3549
81 PONTIAC FIREBIRD			
Cpe 8	5322	5378	5269
81 PONTIAC LEMANS			
Cpe 8	4317	4361	4273
82 PONTIAC PHOENIX			
Cpe	4204	4247	4163
Htchbk Sdn	4204	4247	4163
81 PONTIAC PHOENIX			
Cpe 6	3376	3408	3338
82 VOLKSWAGEN RABBIT			
2 Dr Htchbk	3873	3912	3834
81 VOLKSWAGEN RABBIT			
2-Dr Htchbk	3131	3162	3100
82 DATSUN			
210 2 Dr Std Sdn	3322	3355	3290
Sentra 2 Dr Std Sdn	3681	3717	3644
Stanza Hbk 4 Dr Dlx	4804	4852	4757
81 DATSUN			
210 Std 2 Dr	2761	2789	2733
510 2 Dr Sdn	3519	3555	3485
810 DL 4 Dr	5412	5466	5357
82 TOYOTA			
Corolla Sedan 2 Dr	4292	4336	4249
Celica St Cpe	5572	5627	5516
Corona Sdn Lux 4 Dr	5662	5719	5606
81 TOYOTA			
Corolla 2 Dr Sdn Dlx	3434	3469	3400
Celica St Spt Cpe	4252	4294	4210
Corona Sdn 4 Dr DLK	3881	3919	3843

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october 1984

automotive FLEET

THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS

Factory Fleet Outlook

Unveiling the '85s: Domestic Wrap-Up

OCTOBER 1984 VOL. 23, NO. 12

automotive FLEET

THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS

Influencing over 3.6 million cars and 1.6 million light trucks and vans in leasing, rental, business, government, taxi, police, utility, and driving schools.

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New-Model Car Round-Up p. 56

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Diesel Use with Light-Truck and Van Fleets p. 86

Runzheimer's Analysis of Changes in Personal-Use Chargebacks p. 92

State Automobile Insurance, Registration and Tax Facts p. 112

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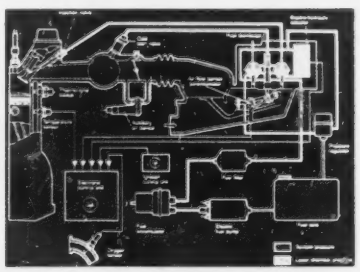

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On our cover: The fleet-minded dealer is an important part of the equation when it comes time for the fleet manager to acquire new models. Here, Ron Vogt of Bryant Pontiac teams up with Jack Fay, fleet manager at Transamerica.

AUTOMOTIVE FLEET® (ISSN 0005-1519) is published monthly by Bobit Publishing Company. The contents of this publication may not be reproduced either in whole or in part without consent of Bobit Publishing. Please address ALL correspondence to the Editorial and Executive Offices at 2500 Artesia Boulevard, Redondo Beach, California 90278. Subscription Prices — United States: $18 per year, $35 for two years; Canadian $22 per year, $40 for two years. International: $50 per year, $100 for two years. Single copy price — $2.00; Fact Book — $20. Number of cars operated and services must accompany the order. Second Class postage paid at Redondo Beach, California 90277-9998 and at additional entry. Postmaster: Return Form 3579 to 2500 Artesia Boulevard, Redondo Beach, California 90278.

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READER UPDATE

Calendar

OCTOBER

1-3 — Truck Body & Equipment Assn. Meeting and Exhibit, Las Vegas, NV.

4-6 — Alliance of State CATRALAs, Harrah's Hotel, Lake Tahoe, CA.

10-14 — International Taxicab Assn., Annual Meeting & Exhibit, Westin Hotel, Chicago, IL.

17-19 — Basic Principles of Fleet Management Course, National Association of Fleet Administrators, Hyatt Regency, Vancouver, British Columbia.

17-21 — National Auto Auction Association Annual Meeting, Gatlinburg, TN.

20-25 — International Assn. of Chiefs of Police, Salt Lake City, UT.

25-26 — Vehicle Maintenance Management Seminar, New Jersey Institute of Technology, Travel Lodge, Mt. Laurel, NJ.

NOVEMBER

7-9 — Municipal Leasing Seminar, American Association of Equipment Lessors, Fairmont Hotel, Denver, CO.

8 — National Highway Users Federation, Madison Hotel, Washington, D.C.

12-14 —Accountants Seminar, American Association of Equipment Lessors, Fairmont Hotel, Dallas, TX.

DECEMBER

9-10 — *Limousine and Chauffeur* show and conference, Caesar's Hotel, Atlantic City, NJ.

Gas Prices

City	UNLEADED Cost Per Gallon Unleaded Full-Serve	 Self-Serve
Little Rock, AR	139.3	113.4
Stockton, CA	154.4	123.9
Denver, CO	144.7	117.4
Washington, DC	137.7	116.9
Miami, FL	147.0	115.1
Atlanta, GA	137.5	114.0
Honolulu, HI	160.5	147.3
Rockford, IL	149.5	124.9
Louisville, KY	144.9	116.9
Worcester, MA	118.9	108.9
Reno, NV	145.9	123.4
New York, NY	127.9	113.9
Beaumont, TX	145.4	112.4
Yakima, WA	151.9	125.4
Flagstaff, AZ	151.4	127.4

Survey conducted during the first five working days of August, 1984.
Supplied by Runzheimer and Company, Inc. Runzheimer Park, Rochester, WI.

NAFA's Survey of Fleets' New-Car Acquisitions

The continuing move to mid-size units is well-documented in the survey. In the '83 model year, 26 percent of the new car acquisitions were mid-size units; in '84, this number rose to 35 percent, and for '85 it will increase to 54 percent of the new car orders.

A total of 250 fleets — 197 sales and service fleets, along with 17 public utility fleets and 36 government fleets — participated in the survey. These fleets operate a total of 192,245 passenger cars. Presented here are a number of market segments that will be of interest to Automotive Fleet *readers.*

The responding fleets plan to acquire the same percentage of new vehicles in the '85 model year as they did in '83 and '84 — 37 percent of their total units.

In addition to the shift away from compacts and sub-compacts, the survey reveals a substantial jump in the number of large cars that will be ordered in '85. However, it must be noted that this category includes vans.

Twenty-nine sales and service fleets say they plan to order some new mini-vans during the coming model year, although some fleet managers expressed doubts about their availability.

Manufacturing-Industrial Group

The manufacturing-industrial group consists of 29 fleets operating 33,313 passenger cars (10,067 company-owned and 23,246 leased). The current composition of these fleets is 63 percent compacts, 31 percent mid-size cars, five percent large cars, and less than one-half of one percent subcompacts. During the '84 model year these fleets acquired 10,892 new cars.

The fleets in the manufacturing-industrial group plan to acquire 13,666 new vehicles during the '85 model year. No fleet in the group will lease or purchase any subcompacts in the coming model year. Of the new-car orders, 47 percent will be compacts, 50 percent mid-size cars, and three percent large cars. Nearly 70 percent of all new-car orders will be for middle or top-of-the-line vehicles.

Note: This group includes one extremely large fleet that plans to acquire 5,000 new-generation vans during the '85 model year. These vehicles are not included in the overall breakdown of new vehicle acquisitions in order not to distort the results.

Four fleets in the group plan basic changes in their vehicle policies for '85. One fleet is switching to mini-vans; one is switching from mid-size to compact cars, while the other two are switching from compacts to mid-size cars.

Twelve fleets report they intend to order some of the new vans — about two percent of the total new car orders for '85, although some expressed reservations about their availability. Seventy-one percent of the new car orders will be four-door sedans, with station wagons accounting for 19 percent of the new vehicle orders. Four percent of the new cars will be five-door hatchbacks, with three percent of the orders for two-door sedans. Sport models and three-door hatchbacks each will account for less than one-half of one percent of the orders.

Six fleets in the group said they plan to order some specialty cars in '85; two fleets plan to order a handful of imports, while six fleets say they have some imports already in service.

Two fleets are making basic changes in the engines ordered for new cars — from six- to four-cylinder power plants. Five fleets in the group report they plan to equip at least some of the '85 models with manual transmissions.

Three-fourths of the fleets acquiring compact cars equip them with four-cylinder engines; the same percentage order their mid-size cars with six-cylinder engines, while all but four fleets ordering any large cars specify an eight-cylinder engine for these vehicles.

Cruise control continues to increase in popularity as an option ordered on all cars. Among the 26 fleets planning to acquire mid-size cars, 18 will have cruise control on all of them. Of the 18 fleets ordering compacts, 10 will equip all cars in this category with cruise control.

Twenty-five of the 29 fleets in the

group permit the operator to choose the make of car desired (from a selector list), while 16 fleets give the driver a choice of model. In addition, 15 fleets allow the operator to add additional equipment at his or her own expense. The most common options available are power door locks, windows, and tilt steering wheel.

Four fleets in the group do not give the employee any voice (except choice of color) in the selection of the company-provided car.

Manufacturing-Consumer Group

The manufacturing-consumer group participating in the annual new-car acquisition survey consists of 21 fleets operating 13,340 passenger cars (5,820 leased and 7,520 company-owned).

The current composition of these fleets is two percent sub-compacts, 61 percent compacts, 32 percent mid-size, and five percent large cars. During the '84 model year these fleets leased or purchased 4,835 new vehicles.

The fleets in the manufacturing-consumer group plan to acquire 4,813 new cars during the '85 model year. Three percent of the new cars will be sub-compacts, 16 percent compacts, 77 percent mid-size, and four percent large cars.

Three fleets in the group are planning major changes in their new-car acquisition policies: one fleet is dropping sub-compacts; one is switching from large to mid-size cars, while the third is moving away from compacts to mid-size vehicles.

Eighty percent of the '85 models the group will order will be middle-line models. Top-of-the-line models will account for eight percent of the new car orders, with 12 percent for bottom-line units.

Six fleets in the group plan to order some new mini-vans — about four percent of the new car orders. Four-door sedans will account for 68 percent of the new models ordered. Station wagons will take 17 percent of the orders, two-door sedans six percent, and five-door hatchbacks five percent. No fleet in the group plans to order three-door hatchbacks or sport models.

Four fleets in the group say they will order some two-door specialty cars during the '85 model year. One fleet says it will order a few imports, and seven fleets say they already have a handful of import cars in service.

The pattern of engine use in this group is similar to all others — compacts have four-cylinder engines, most mid-size cars have six-cylinder engines, and almost all large cars have eight-cylinder engines.

Four fleets in the group are planning major changes in their engine specifications for '85: two are switching from sixes to four-cylinder engines, while the other two, conversely, are switching from fours to six-cylinder engines. One fleet in the manufacturing-consumer group plans to equip at least some of its new small cars with manual transmissions. One fleet reported that it is taking the final step in converting all its vehicles to be equipped with air conditioning as standard equipment.

Cruise control continues its growth as an option becoming standard equipment. It will be installed on all cars of 10 of the 12 fleets ordering large cars; 16 of the 20 fleets ordering mid-size cars, and in five of the nine fleets ordering compact cars. Two of the fleets ordering subcompacts are also specifying cruise control on all vehicles.

Seven fleets in the group give the operator no choice (except color) in the assigned fleet car. Of the 14 fleets permitting a choice, all allow the operator to select the make; eight give a choice of model, four permit the driver to select a desired engine, and one allows a choice of manual or automatic transmission. Twelve fleets permit the assigned driver to purchase additional optional equipment at his or her own expense.

U.S. Commercial Fleet Summary

Group	Number of Cars	Owned	Leased	Current Composition: Sub-Compact	Compact	Mid-Size	Large	1984 New Car Acquisitions	1985 Planned New Car Acquisitions	Sub-Compact	Compact	Mid-Size	Large
Drug & Cosmetics (32)	25,728	1,539	24,189	376	5,467	18,025	1,860	10,302	10,146	100	1,106	8,472	468
Food & Beverage (22)	12,378	9,109	3,269	60	3,199	8,531	588	5,067	4,866	9	1,492	3,200	166
Manufacturing—Consumer (21)	13,340	7,520	5,820	250	8,202	4,207	681	4,835	4,813	155	784	3,696	178
Manufacturing—Industrial (39)	33,313	10,067	23,246	211	21,084	10,283	1,755	10,892	13,666	—	4,110	4,290	266
Chemical & Petroleum (29)	23,479	16,507	7,972	—	2,590	16,360	5,529	6,778	7,542	—	1,462	4,718	1,362
Insurance (39)	34,782	21,048	13,714	4,497	20,096	9,409	777	12,677	12,236	1,915	5,627	4,433	261
Miscellaneous (14)	5,365	1,628	3,737	40	950	1,887	2,488	1,774	1,743	—	126	811	806
Totals (197)	149,385	67,418	81,947	5,424	61,570	68,603	13,678	52,325	55,012	2,179	14,707	29,622	8,504

"Chemical and Petroleum: 67 percent mid-size . . ."

Chemical and Petroleum Group

The chemical and petroleum group consists of 29 fleets operating 24,479 passenger cars (7,972 leased, 16,507 company-owned). The current composition of the fleets is 11 percent compacts, 67 percent mid-size, and 22 percent large cars. During the '84 model year the fleets in this group acquired 6,778 new cars. They plan to acquire 7,542 new vehicles during the '85 model year.

Two fleets in the chemical and petroleum group are making major changes in their acquisition policies: one is dropping both subcompacts and compacts, while the other is switching from mid-size to large cars because "mid-size cars are too low to the ground for off-road right-of-way inspections."

Sixty-three percent of the group's '85 new-car orders will be for mid-size units, 19 percent for compacts, and 18 percent for large cars. The chemical and petroleum group has the largest percentage of large cars

U.S. Composite Survey Fleet

1980-1984 Model Years
(Excluding Government & Public Utility Fleets)

	1980	1981	1982	1983	1984
Number of Cars in Fleet	794	750	762	632	758
Current Composition of fleet					
Sub-Compacts	24	15	23	12	30
Compacts	234	348	404	323	311
Mid-Size	429	420	282	240	349
Large	103	67	53	57	68
Actual Acquisitions in Previous Year	303	284	274	211	266
Planned New Car Acquisitions in Coming Model Year	308	302	284	232	279
Sub-compacts	31	21	19	2	11
Compacts	154	205	185	133	75
Mid-Size	108	67	74	81	151
Large	15	0	6	42	

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"Cruise control . . . becoming standard equipment."

of any U.S. commercial fleet group. No fleet in the group is planning to acquire any sub-compacts in the coming model year.

Only six percent of the group's '85 new cars will be top-of-the-line models, 66 percent will be middle-line models, while 27 percent will be bottom-line models (here, too, the chemical and petroleum group is the leader, as in large cars).

Only two fleets in the group are planning to acquire any new minivans, less than one-half of one percent of the total new-car acquisitions, with station wagons getting about five percent of the orders, and two-door sedans one percent. No fleet in the group is planning to order any three-door hatchbacks or sport models.

No fleet that responded to the new-car acquisition survey is planning to acquire any two-door specialty models. One fleet reports it will order a few imports, while two fleets have a few imports currently in service.

Two fleets in the group will change their engine specifications for '85 models — one is switching away from eights to four- and six-cylinder engines, while the other is switching from sixes to fours. Three fleets report they are planning to order some of their '85 models with manual transmissions.

At the present time, almost all compacts in this group's fleets are equipped with four-cylinder engines, 60 percent of the mid-size cars have six-cylinder engines, 25 percent have four-cylinder engines, and 15 percent have eight-cylinder engines. 19 of the 23 fleets ordering large cars will specify an eight-cylinder engine for those vehicles.

As in other groups, cruise control continues to grow as an option becoming standard equipment. Among 18 fleets ordering large cars, it will be standard on 14 of them. Of the 20 fleets planning to acquire mid-size cars, 13 will specify cruise control on all vehicles, as will four of the six fleets acquiring compact cars during the '85 model year.

Twenty-five of the 29 fleets in the chemical and petroleum group give the operator some voice in the new-vehicle selection process. 24 permit choice of the make of car, 12 allow a choice of model, eight permit the operator to choose the engine, three the transmission, and eight fleets permit extra equipment to be added at the employee's expense. Only four fleets in the group give the operator no voice in the selection of the company-provided car.

Drug and Cosmetic Group

Thirty-two fleets operating 25,728 passenger cars (24,189 leased, 1,539 company-owned) make up the drug and cosmetic group participating in the annual new-car acquisition survey. The current composition of these fleets is two percent subcompacts, 21 percent compacts, 70 percent mid-size, and seven percent large cars.

The fleets in the drug and cosmetic group acquired 10,302 new

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"Drug and Cosmetic: 83 percent mid-size . . ."

cars during the '84 model year. They plan to lease or purchase 10,146 new vehicles during the '85 model year. Of their new car acquisitions, one percent will be subcompacts, 11 percent will be compacts, 83 percent will be mid-size, and five percent will be large cars. No fleet in the group is planning any basic change in its fleet car policy, although the trend to mid-size cars is growing stronger.

Three fleets in the group are planning to add some new mini-vans during the coming model year. Sixty-six percent of the new car orders will be for four-door sedans, 23 percent for two-door sedans (the highest percentage of any group), five percent for station wagons, three percent for five-door hatchbacks, and one percent each for three-door hatchbacks and sport models. Nine fleets in the group plan to order two-door specialty models. Five fleets say they plan to acquire some imports in the '85 model year, while 11 fleets report they already have some imports in service.

Ninety-three percent of the group's new-car orders will be middle or top-of-the-line models, with only seven percent for bottom-line models.

Four cylinder engines are almost the unanimous choice of the group for their compact cars; while a large majority plan to use six-cylinder engines in their mid-size cars, and a smaller majority will equip their large cars with eight-cylinder engines.

Four fleets in the drug and cosmetic group are planning major engine changes for '85 — two are switching from six-cylinder engines to fours, while the other two are going the other way, switching from fours to sixes.

Two fleets in the group will be equipping at least some of the '85 compacts and mid-size cars with manual transmissions. In the drug and cosmetic group, often a trend-setter, tilt steering wheel is becoming almost as frequent an option ordered for every car as cruise control. For example, among the 18 fleets ordering large cars, 12 are ordering all cars with tilt wheel and 15 are equipping them with cruise control. Among the 31 fleets ordering mid-size cars, 11 plan to equip them with tilt wheel and 13 with cruise control.

Twenty-nine of the 32 fleets in the group give the operator a choice of make or model new car to be ordered; only three do not give the employee a voice in the new-car selection process. Of the 29 offering a choice, 25 fleets permit a choice of make of car, 21 allow the operator to select the model desired, two permit a choice of engine, and three the type of transmission desired. 26 fleets permit assigned operators to add additional items of optional equipment to the vehicle — at their personal expense.

Public Utilities

The public utility group con-

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sists of 17 fleets operating 21,432 passenger cars (19,110 company-owned, 2,322 leased). The current composition of these fleets is 25 percent subcompacts, 48 percent compacts, 24 percent mid-size, and three percent large cars. During the '84 model year these fleets acquired 2,524 new vehicles. They plan to acquire 3,408 passenger cars and vans during the '85 model year.

Four fleets in the public utility group are planning major changes in their car policies — one is switching to subcompacts from compacts, one is switching from large to compacts, one is moving from large to mid-size, and the final fleet is moving from mid-size to compact cars.

Seventy-three percent of the group's '85 new-car acquisitions will be compact cars, 13 percent will be subcompacts, 13 percent will be mid-size cars, and two percent large cars. More than 70 percent of the new-car acquisitions will be middle-line models, with only two percent of the vehicles top-of-the-line models.

Three fleets in the group are planning to order some new mini-vans during the coming year (only slightly more than one percent of the total new-car orders). Four-door sedans will account for 90 percent of the new car orders, with five-door hatchbacks accounting for eight percent. One percent of the orders will be for station wagons.

No fleet in the public utility group is planning to order any two-door specialty models or acquire any imports during the coming model year. However, two fleets did report they had some imports already in service.

The public utility fleets participating in the annual new-car acquisition survey followed the same pattern in engine use as the other segments of the survey: four-cylinder engines in subcompacts and compacts, six-cylinder engines in mid-size cars, and eight-cylinder engines in their few large cars.

Two fleets are planning major changes in their engine policy for '85. One is switching from fours to sixes in their mid-size cars, while the other is switching to the smaller four-cylinder engine. One fleet plans to order manual transmissions with its four-cylinder engine cars. One other fleet plans to decrease the number of cars it orders with air conditioning.

None of the public utility fleets permit the operator to add optional equipment to the specified fleet car, and none give the employee any choice in the vehicle selection.

The fleets ordering large cars equip them completely. Seven of the 11 fleets ordering these vehicles include tilt wheel as standard equipment, while eight order the cars with cruise control. Seven of the 13 fleets ordering mid-size vehicles equip all units with cruise control. AF

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Runzheimer's Analysis of Changes in Personal-Use Chargeback

"You ain't seen nothing yet" is possibly the best way to describe what the fleet future holds. In the past 18 months, there have been numerous fleet brouhahas in D.C.

First came the threat of an IRS-dictated change in the tax status of open-end leases, containing terminal rental adjustment clauses. Then came Gene Taylor and his band of dealers and captive congressmen, grousing loudly about the incentives that Detroit gives to volume purchasers, meaning fleets. Then came an odometer-tampering witch-hunt, ignited by 60 Minutes, *and having an impact today on fleets through lowered resale value for high-mileage vehicles.*

But in the lee of last summer's Deficit Reduction Act, the best way to describe the fleet outlook may be the phrase "You ain't seen nothing yet." Not only will we see changes in deductions for higher-priced autos, but the end of the year may also usher out the days of the company car as pure perc. Specifically, if an automobile is used less than 51 percent for business, the taxpayer will be denied any investment tax credit on the auto.

Of course, there will be additional changes, in the ACRS recovery allowances, for example, in mandatory, five-year straight-line depreciation, or in the way that business use must be verified and personal-use must be included as wages, with taxes withheld.

In the last few months, much of the discussion about the Deficit Tax has been limited to lawyers and accountants. In August, Automotive Fleet *published a bill analysis by AALA counsels, Volpe, Boskey, and Lyons. An analysis of the bill's effects on leasing companies and their clients by accountant Earl Holtzman and tax manager Larry Isaacson was published in the September* Automotive Fleet.

But it is time for the dialogue to be expanded. It is time, in fact, for every fleet manager in the country to realize that it is incumbent upon him or her to take a close look at company policies concerning personal-use.

With that in mind, Runzheimer Reports on Transportation *recently presented a three-part series called "Trends in Personal-Use Chargebacks." Penned by Runzheimer Editor Adlore Chaudlier, the report provides fleet-managers with some much needed perspective on the personal-use question. Germane sections of the report follow:*

Many fleet managers have to juggle various considerations to effectively deal with personal-use chargebacks. On occasion, they may wish they had three hands to keep everything coordinated. On one hand, the fleet manager must deftly handle the wishes of senior management and oftentimes keep a keen eye on the fluctuations of the bottom line. On the second hand, the wishes and demands of employees for the personal-use "perc" can be difficult to coordinate with company policy and IRS regulations. On the third hand, the fleet manager must know and understand the requirements of the Internal Revenue Service regarding personal use of company cars and ascertain that the company meets those requirements.

To bring some semblance of order to the increasing complexity of handling personal-use chargebacks and related policy, Runzheimer opened with survey data, presenting their biennial *Survey and Analysis of Business Car Policies and Costs*. And they followed that with helpful advice as to how fleet managers should respond to the changed personal-use atmosphere. And in a final section, they projected the effect of the new tax law on car fleets.

Personal-Use Survey Results

Runzheimer published its first biennial *Survey an Analysis of Business-Car Policies and Costs* in '75. To paint a precise picture of how personal-use charges have